100

Diagnostic Tool
110

Server 102

Network 104
(e.g., Internet)

Client 1
106

Client 2
106

Client N
106

FIG. 1

200

START

| 202
RECEIVE USER-SPECIFIED INFORMATION
PERTAINING TO BUSINESS CHALLENGES OF AN
ORGANIZATION

| 204
ESTIMATE BENEFITS THAT CAN BE GAINED BY THE
ORGANIZATION AND PRESENT THE ESTIMATED
BENEFITS TO THE USER

| 206
IDENTIFY BUSINESS PROCESSES THAT CAN
ADDRESS THE BUSINESS CHALLENGES OF THE
ORGANIZATION

| 208
RECOMMEND THE IDENTIFIED BUSINESS
PROCESSES TO THE USER

END

FIG. 2

300

Benefit Statistics
Database
320

Common Business
Challenge
Database
302

UI
Module
304

Adoption
Assessment
Module
306

Benefit
Value
Calculator
308

Access
Controller
310

Business
Process
Identifier
312

Best Practice
Recommendation
Module
314

Business Process
Database
316

FIG. 3

400

START

402
FACILITATE USER INPUT OF A FUNCTION TO BE EVALUATED

404
DISPLAY A LIST OF COMMONLY EXPERIENCED BUSINESS CHALLENGES FOR THE FUNCTION

406
RECEIVE RANKING OF COMPANY PERFORMANCE FOR EACH BUSINESS CHALLENGE AND DATA IDENTIFYING MOST IMPORTANT BUSINESS CHALLENGES

408
RECEIVE INDUSTRY AND FINANCIAL DETAILS

410
RECEIVE USER ASSESSMENT OF BENEFITS

412
DETERMINE COMPANY'S LEVEL OF ADOPTION AND COMMUNICATE IT TO THE USER

414
ASSESS BENEFITS BASED ON STATISTICAL DATA AND DISPLAY TWO SETS OF ESTIMATES

416
USER HAS LEVEL 2 ACCESS

N

Y

418
FIND BUSINESS PROCESSES ADDRESSING COMPANY'S BUSINESS CHALLENGES

420
DISPLAY SUMMARY OF RELEVANT BUSINESS PROCESSES

422
DISPLAY DETAILS OF A RELEVANT BUSINESS PROCESS UPON A USER REQUEST

424
DISPLAY RELEVANT SUCCESS STORIES OF OTHER CUSTOMERS UPON A USER REQUEST

426
DISPLAY RELEVANT STRATEGIC BEST PRACTICES UPON A USER REQUEST

428
DISPLAY RELEVANT FUNCTIONAL BEST PRACTICES UPON A USER REQUEST

END

FIG. 4

500

START

502

DETERMINE APPLICABLE METRICS

504

CLASSIFY METRICS BY GROUP

506

RANK APPLICABLE METRICS

508

ADJUST APPLICABLE METRICS

510

ASSOCIATE METRIC WITH SG&A ALLOCATION

512

ENSURE CALCULATED BENEFIT IS
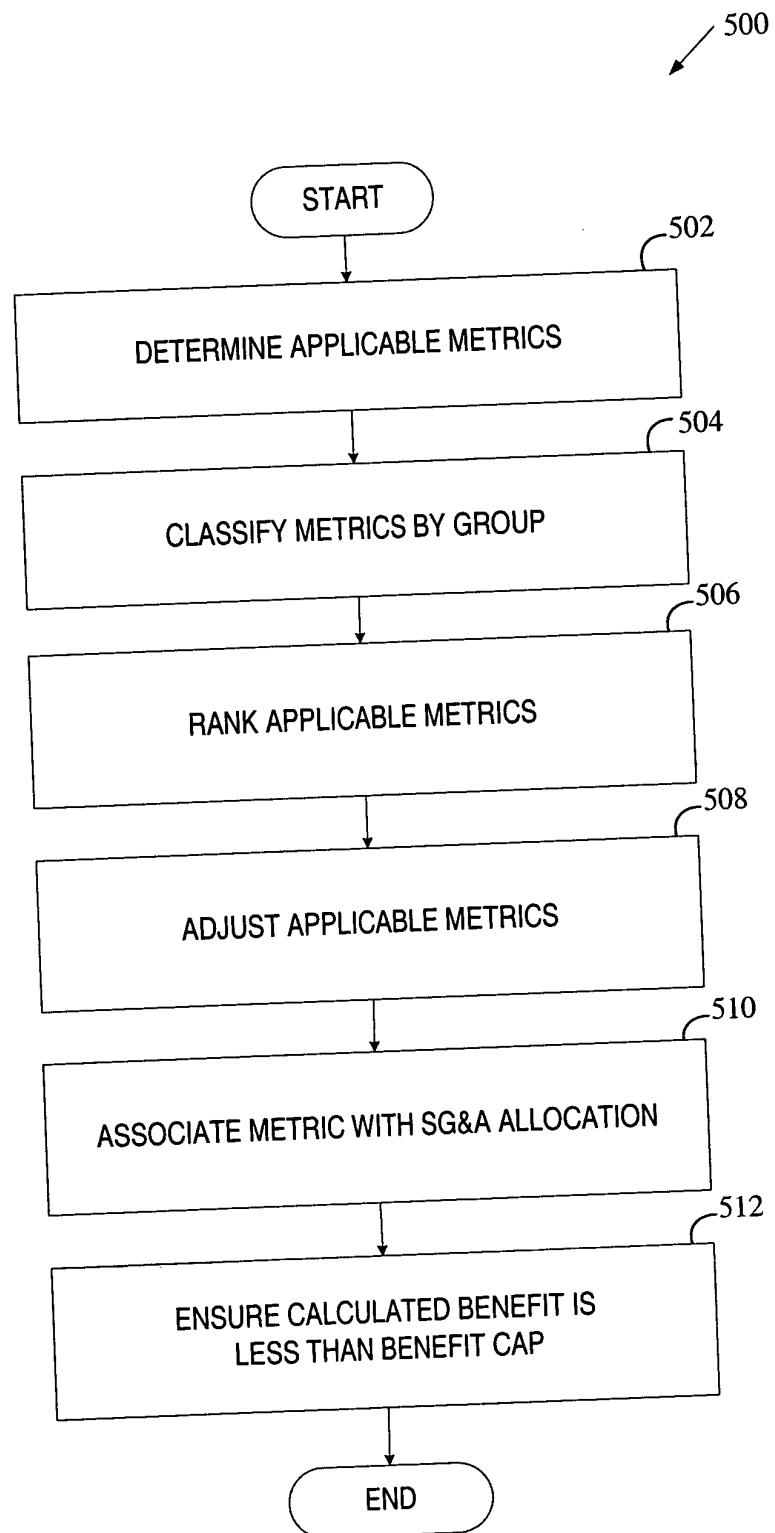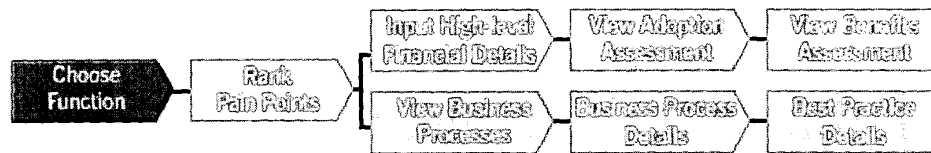LESS THAN BENEFIT CAP

END

FIG. 5

Choose Function

To begin, choose a function that you would like to evaluate. You may return to assess additional functions, and the latest results of each assessment you complete are saved for later review and updates.

Function	Assess This Function	View Previous Assessment
Sales		Review results or update inputs ▷
Service		Review results or update inputs ▷
Marketing	Begin the assessment ▷	
Employees	Begin the assessment ▷	
Partners	Begin the assessment ▷	
Integration	Begin the assessment ▷	

FIG. 6A

Input High-level Financial Details — View Adoption Assessment — View Benefits Assessment

Choose Function ▶ Rank Pain Points ▶ View Business Processes — Business Process Detail — Benefits Process Detail

Rank Pain Points

Next, please rank the performance of your business for each of the following pain points relating to Sales on a scale of 1 to 4 as follows:

1. Poor
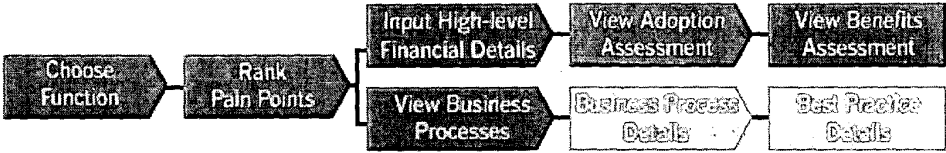2. Below Average
3. Above Average
4. Best in Class

Your overall level of adoption of integrated business processes and related best practices for Sales will be assessed based on your rankings for all pain points listed below.

Also, please identify the three pain points from the list below that are most important to your business. High-level financial and performance benefits will be estimated based on the value of fully adopting integrated business processes and related best practices for the three pain points you choose.

Sales Pain Points	Ranking 1=Poor, 4=Best in Class	Most Important (Three only)
Save Pain Point Information		
Optimizing sales team resource allocation and managing territories	⊙1 ○2 ○3 ○4	☑
Producing accurate, timely, actionable sales forecasts	⊙1 ○2 ○3 ○4	☑
Understanding and managing the day-to-day focus of the sales organization	⊙1 ○2 ○3 ○4	☑
Ensuring that new sales team members learn and contribute quickly	⊙1 ○2 ○3 ○4	☐
Maximizing the overall productivity of the sales organization	⊙1 ○2 ○3 ○4	☐
Qualifying and prioritizing leads	⊙1 ○2 ○3 ○4	☐
Routing leads to the appropriate sales team members and ensuring timely follow-up	⊙1 ○2 ○3 ○4	☐
Ensuring that sales teams fully understand customers' businesses, pain points, strategic and financial priorities, and industries	⊙1 ○2 ○3 ○4	☐
Maintaining a consistent and effective approach to selling	⊙1 ○2 ○3 ○4	☐
Delivering accurate, high-quality, current sales proposals	⊙1 ○2 ○3 ○4	☐
Generating accurate, valid quotes consistently based on the latest product, pricing, configuration, and bundling information	⊙1 ○2 ○3 ○4	☐
Providing sales teams with up-to-date information regarding product availability, order status, and shipping status	⊙1 ○2 ○3 ○4	☐
Communicating order information internally and externally for fulfillment	⊙1 ○2 ○3 ○4	☐
Implementing and maintaining simple, transparent, flexible, and effective sales compensation systems	⊙1 ○2 ○3 ○4	☐
Selling collaboratively over the Web	⊙1 ○2 ○3 ○4	☐
Managing product portfolios and catalogs	⊙1 ○2 ○3 ○4	☐
Establishing and maintaining effective pricing strategies	⊙1 ○2 ○3 ○4	☐
Save Pain Point Information		

FIG. 6B

Function: Sales

Input Industry and High-Level Financial Details

To enable us to quantify the potential financial impact on your business of successfully addressing the pain points you have identified, please input your industry and annual revenue from your most recent fiscal year. Then, accept or modify the dollar values and percent of revenue that we estimate for selling, general, and administrative costs, based on your revenue and industry.

Step 1
Select your industry: Cross Industry Average ▼

Step 2		
Total annual revenue:	$ 10,000	
Total annual selling, general, and administrative costs:	$ 3,600	or 36 % of revenue.

Submit

FIG. 7

Benefits Self Assessment

Please input your estimates, in terms of percent improvement, for the benefits that your business can achieve from successfully addressing each of the most important pain points you have identified.

If you have assessed more than one functional area it is important to understand that the benefits self assessment is cumulative in nature and any additional benefit values are incremental to the values previously reported for other functional areas.

	% Increase in Total Annual Revenue	% Decrease in Selling, General, & Administrative Costs	% Increase in Customer Satisfaction	% Increase in Employee Morale
Optimizing sales team resource allocation and managing territories	0 %	0 %	0 %	0 %
Producing accurate, timely, actionable sales forecasts	0 %	0 %		
Understanding and managing the day-to-day focus of the sales organization	0 %	0 %		

[Save Financial Details and Self-Assessment]

FIG. 8

Function: Sales

| Choose Function | Rank Pain Points | Input High-level Financial Details | View Adoption Assessment | View Benefits Assessment |
| View Business Processes | Business Process Details | Best Practice Details |

Adoption Assessment

Based on the type and severity of pain points you have identified for Sales, we classify your company as having Substantial Improvement Opportunities.

Level of Adoption	Description
1 - Substantial Improvement Opportunities	Developing and implementing comprehensive Customer, Partner, and Employee Relationship Management strategies can greatly increase competitiveness by addressing critical pain points and generating significant financial returns
2 - Early-Stage Adopter	Building on early successes to impact additional pain points can create competitive advantage
3 - Emerging Leader	Focused achievement of best practices for remaining pain points can solidify industry leadership
4 - Best Practitioner	Maintaining leading-edge business processes and best practices and ensuring consistent and efficient execution can extend competitive advantage over time

> Continue to Benefits Summary

FIG. 9

High-Level Benefits Summary

The following is an assessment of the impact on high-level financial and performance measures from successfully addressing the Pain Points that you have identified as being most important to your business. Two sets of estimates are provided: one based on the percent improvements you just input, and another set of conservative improvements based on our experience with over 3,000 customer implementations.

Estimated Direct Revenue, Cost, Customer Satisfaction, and Employee Morale Benefits

Based on *Your* Estimated Percent Improvements From Successfully Addressing Top Pain Points

		Total Annual Revenue	Total Annual Selling, General, and Administrative Costs [1]	Customer Satisfaction [2]	Employee Morale [3]
Sales	% Improvement				
	Annual Dollar Value				
Service	% Improvement	1.5%	5.0%	10.0%	10.0%
	Annual Dollar Value	$ 2.5	$ 3.0	See Below	See Below
Marketing	% Improvement	3.0%	2.5%	5.0%	2.0%
	Annual Dollar Value	$ 5.0	$ 1.5	See Below	See Below
Employees	% Improvement				
	Annual Dollar Value				
Partners	% Improvement				
	Annual Dollar Value				
Integration	% Improvement	0.0%	4.0%	0.0%	0.0%
	Annual Dollar Value	$ -	$ 2.4	See Below	See Below
Total	% Improvement	4.5%	11.5%	15.0%	12.0%
	Annual Dollar Value	$ 7.5	$ 6.9	See Below	See Below

Estimated Additional Revenue and Cost Benefits from Direct Customer Satisfaction and Employee Morale Benefits Listed Above [2,3]

Total Customer Satisfaction	% Improvement [2,3]	3.0%	0.0%	
	Annual Dollar Value	$ 5.0	$ -	
Total Employee Morale	% Improvement [2,3]	0.0%	1.5%	
	Annual Dollar Value	$ -	$ 0.9	
Total	Annual Dollar Value	$ 5.0	$ 0.9	

Estimated Total Revenue and Cost Benefits to your Organization

Total Financial Benefit	Annual Dollar Value	$ 12.6	$ 7.8

Estimated Direct Revenue, Cost, Customer Satisfaction, and Employee Morale Benefits

Based on our Estimated Percent Improvements From Successfully Addressing Top Pain Points

		Total Annual Revenue	Total Annual Selling, General, and Administrative Costs [1]	Customer Satisfaction [2]	Employee Morale [3]
Sales	% Improvement				
	Annual Dollar Value				
Service	% Improvement	1.0%	3.0%	8.0%	5.0%
	Annual Dollar Value	$ 1.7	$ 1.8	See Below	See Below
Marketing	% Improvement	2.0%	0.0%	5.0%	5.0%
	Annual Dollar Value	$ 3.3	$ -	See Below	See Below
Employees	% Improvement				
	Annual Dollar Value				
Partners	% Improvement				
	Annual Dollar Value				
Integration	% Improvement	0.0%	3.0%	0.0%	0.0%
	Annual Dollar Value	$ -	$ 1.8	See Below	See Below
Total	% Improvement	3.0%	6.0%	13.0%	10.0%
	Annual Dollar Value	$ 5.0	$ 3.6	See Below	See Below

Total Customer Satisfaction	% Improvement [2,3]	2.6%	0.0%	
	Annual Dollar Value	$ 4.3	$ -	
Total Employee Morale	% Improvement [2,3]	0.0%	1.3%	
	Annual Dollar Value	$ -	$ 0.8	
Total	Annual Dollar Value	$ 4.3	$ 0.8	

Total Financial Benefit	Annual Dollar Value	$ 9.3	$ 4.4

[1] Improvement Percentages and Savings Estimates assume that Selling, General, and Administrative Costs are composed as follows: Selling Costs (35%), Marketing Costs (15%), Service Costs (25%), IT Costs (5%), Other Costs (20%)

[2] Although no Revenue benefits have been included in "Direct" estimates for improvements in Customer Satisfaction, we have generally noted an additional 1-3% increase in total revenue for each 10% increase in Customer Satisfaction levels. This revenue increase is itemized separately in the "Estimated Additional Revenue and Cost Benefits" section of the High-Level Benefits Summary

[3] Although no Cost benefits have been included in "Direct" estimates above for improvements in Employee Morale, we have generally noted an additional 0.5-2% decrease in total Selling, General, and Administrative Expenses for each 10% increase in Employee Morale levels. This cost decrease is itemized separately in he "Estimated Additional Revenue and Cost Benefits" section of the High-Level Benefits Summary

FIG. 10

Function: Sales

Summary of Related Business Processes

To begin developing a strategy for addressing the pain points you have identified, drill down on the related   business processes below. Each business process includes detailed information to help you better understand how this business process could benefit your company:

- Business process description
- Performance metrics to measure and evaluate process effectiveness
- Best practices designed to ensure your success
- Success stories of   customers who have successfully addressed similar pain points

Optimizing sales team resource allocation and managing territories	
YOUR RANKING **1** (1=Poor, 4=Best in Class)	Related Business Processes — Define Sales Segmentation / Construct Coverage Strategy / Plan Sales Force Quotas

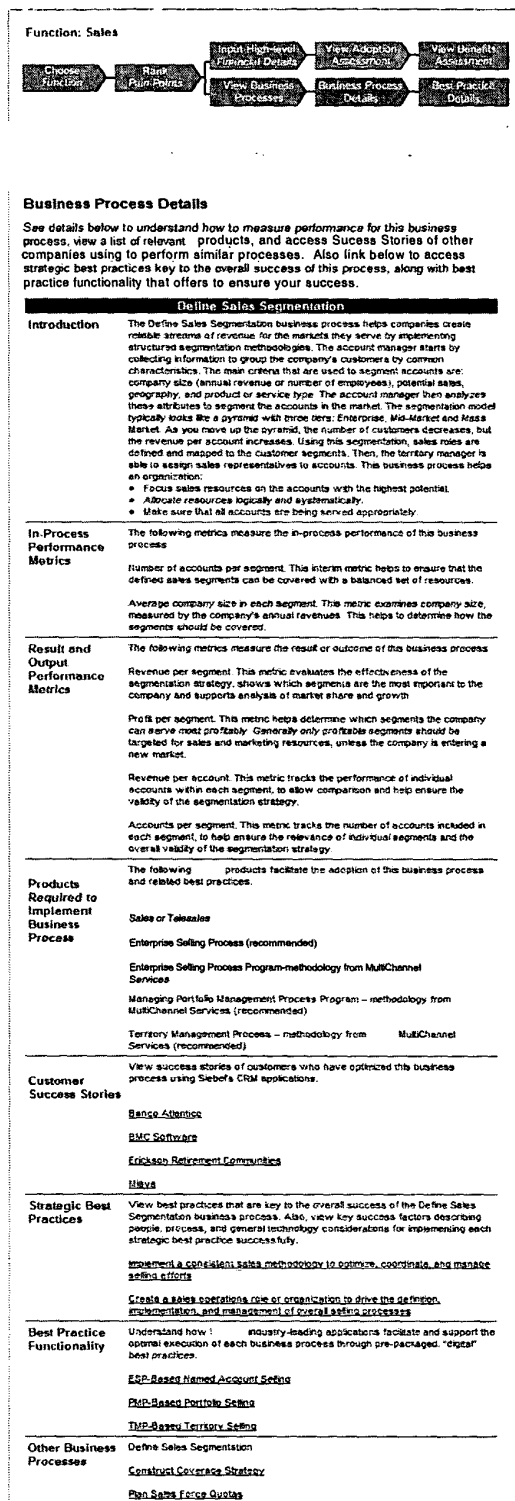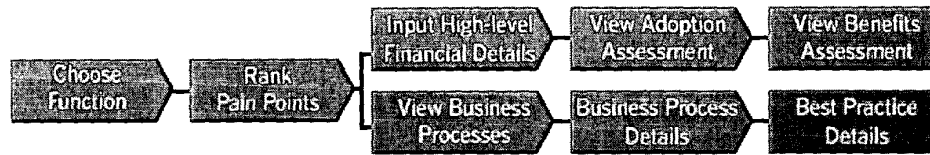| Producing accurate, timely, actionable sales forecasts	
YOUR RANKING **1** (1=Poor, 4=Best in Class)	Related Business Processes — Define and Revise Methodology / Create Sales Forecast / Register Opportunity

FIG. 11

Function: Sales

Choose Function → Rank Pain Points → Input High-level Financial Details → View Adoption Assessment → View Benefits Assessment

View Business Processes → Business Process Details → Best Practice Details

Business Process Details

See details below to understand how to measure performance for this business process, view a list of relevant products, and access Sucess Stories of other companies using to perform similar processes. Also link below to access strategic best practices key to the overall success of this process, along with best practice functionality that offers to ensure your success.

Define Sales Segmentation

Introduction	The Define Sales Segmentation business process helps companies create reliable streams of revenue for the markets they serve by implementing structured segmentation methodologies. The account manager starts by collecting information to group the company's customers by common characteristics. The main criteria that are used to segment accounts are: company size (annual revenue or number of employees), potential sales, geography, and product or service type. The account manager then analyzes these attributes to segment the accounts in the market. The segmentation model typically looks like a pyramid with three tiers: Enterprise, Mid-Market and Mass Market. As you move up the pyramid, the number of customers decreases, but the revenue per account increases. Using this segmentation, sales roles are defined and mapped to the customer segments. Then, the territory manager is able to assign sales representatives to accounts. This business process helps an organization: • Focus sales resources on the accounts with the highest potential. • Allocate resources logically and systematically. • Make sure that all accounts are being served appropriately.
In-Process Performance Metrics	The following metrics measure the in-process performance of this business process Number of accounts per segment. This interim metric helps to ensure that the defined sales segments can be covered with a balanced set of resources. Average company size in each segment. This metric examines company size, measured by the company's annual revenues. This helps to determine how the segments should be covered.
Result and Output Performance Metrics	The following metrics measure the result or outcome of this business process Revenue per segment. This metric evaluates the effectiveness of the segmentation strategy, shows which segments are the most important to the company and supports analysis of market share and growth Profit per segment. This metric helps determine which segments the company can serve most profitably. Generally only profitable segments should be targeted for sales and marketing resources, unless the company is entering a new market. Revenue per account. This metric tracks the performance of individual accounts within each segment, to allow comparison and help ensure the validity of the segmentation strategy. Accounts per segment. This metric tracks the number of accounts included in each segment, to help ensure the relevance of individual segments and the overall validity of the segmentation strategy.
Products Required to Implement Business Process	The following products facilitate the adoption of this business process and related best practices. Sales or Telesales Enterprise Selling Process (recommended) Enterprise Selling Process Program-methodology from MultiChannel Services Managing Portfolio Management Process Program – methodology from MultiChannel Services (recommended) Territory Management Process – methodology from MultiChannel Services (recommended)
Customer Success Stories	View success stories of customers who have optimized this business process using Siebel's CRM applications. Banco Atlantico BMC Software Erickson Retirement Communities Maya
Strategic Best Practices	View best practices that are key to the overall success of the Define Sales Segmentation business process. Also, view key success factors describing people, process, and general technology considerations for implementing each strategic best practice successfully. Implement a consistent sales methodology to optimize, coordinate, and manage selling efforts Create a sales operations role or organization to drive the definition, implementation, and management of overall selling processes
Best Practice Functionality	Understand how industry-leading applications facilitate and support the optimal execution of each business process through pre-packaged, "digital" best practices. ESP-Based Named Account Selling PMP-Based Portfolio Selling TMP-Based Territory Selling
Other Business Processes	Define Sales Segmentation Construct Coverage Strategy Plan Sales Force Quotas

FIG. 12

Function: Sales

| Choose Function | Rank Pain Points | Input High-level Financial Details | View Adoption Assessment | View Benefits Assessment |
| View Business Processes | Business Process Details | Best Practice Details |

Strategic Best Practice Details

Strategic best practices are key to the overall success of a business process. Key success factors describe people, process, and general technology considerations for implementing each strategic best practice successfully.

Implement a consistent sales methodology to optimize, coordinate, and manage selling efforts

Detailed Description

Effective sales methodologies provide a common framework for sales execution considering such factors as overall corporate strategy, selling strategy and organization, products, target customers, and competitive dynamics. Sales methodologies define the sales process and provide a common language for assessing deal status, including such factors as timing and likelihood of closure. Sales methodologies also help optimize selling tactics and focus effort for particular accounts and opportunities.

Standard sales methodologies improve sales efficiency and productivity by ensuring the consistent application of optimal selling approaches, improving communication and collaboration among distributed sales teams, and providing a consistent foundation for managing complex and distributed sales organizations.
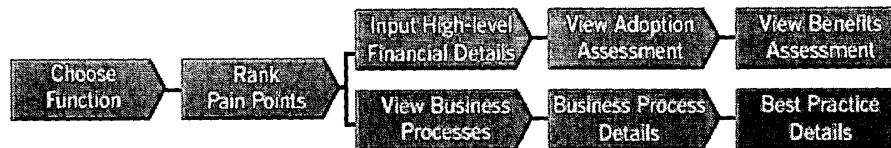
Key Success Factors

- Sales management must define an appropriate sales methodology in light of internal and external needs and requirements
- Sales management must drive adoption of the sales methodology by communicating its value to sales reps in their own terms, ensuring that well respected sales rep "floor leaders" champion adoption, providing coaching and training, and measuring and rewarding adherence and adoption
- Information systems must consistently support the implementation of the chosen sales methodology throughout the organization
- Information systems must provide role-specific selling assistance to individuals based on their role within the sales team
- Information systems must support the real-time aggregation and analysis of key deal status indicators defined by the sales methodology across such variables as sales periods, accounts, sales reps, sales stages, products, and regions
- Information systems must track key indicators of usage and adoption of the sales methodology by individual sales reps
- Sales management must adopt the sales methodology into its own processes, such as pipeline management and forecasting

<u>Return to Business Process</u>

FIG. 13

Function: Sales

| Choose Function | → | Rank Pain Points | → | Input High-level Financial Details | → | View Adoption Assessment | → | View Benefits Assessment |
| | | | | View Business Processes | → | Business Process Details | → | Best Practice Details |

Best Practice Functionality Details

Understand how our industry-leading applications facilitate and support the optimal execution of each Business Process through pre-packaged, "digital" best practices.

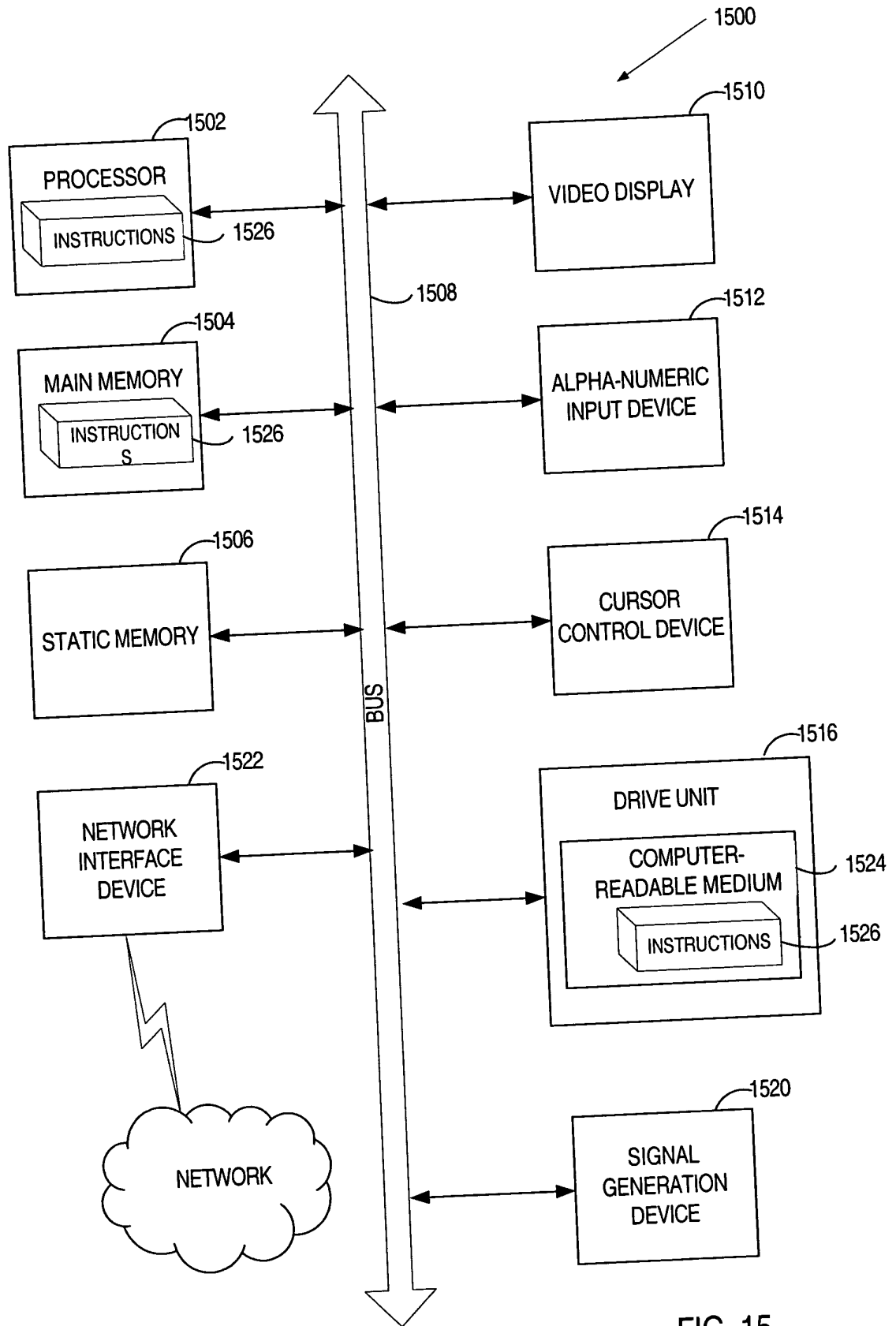| **ESP-Based Named Account Selling**	
Detailed Description	The Enterprise Selling Process (ESP) is a structured methodology for sales, sales support and marketing teams responsible for penetrating, covering and growing their largest accounts. The ESP Methodology includes the following
	• Account segmentation to ensure that the account team identifies and sells across multiple units of the account.
	• Planning and strategy development to win new business and use partner and customer relationships.
	• Creating action plans to measure and monitor progress against the account plan in order to assure continuous opportunity development and relationship management.

FIG. 14

FIG. 15